

# THE POWER OF BEING UNDERSTOOD

## MICROSOFT DYNAMICS 365 CUSTOMER INSIGHTS QUICK START

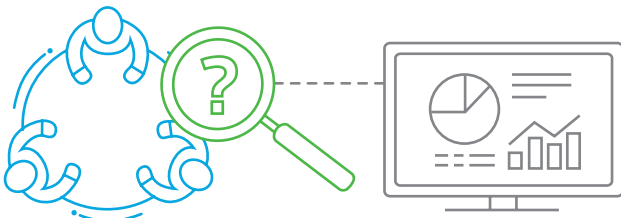
Leverage customer data toward exceptional customer experiences for revenue retention and growth

Your organization has a significant amount of customer data, but all too often it's siloed across disparate systems. To win at online customer relationships, Microsoft Dynamics 365 Customer Insights unifies enterprise customer data to build comprehensive customer profiles and create customer segments for measurement, predictive scoring and campaign targeting. By aggregating and simplifying data from various source systems, marketers, sellers and data analysts can focus more on supporting retention and revenue growth and less on manual data management efforts.

Ultimately, Dynamics 365 Customer Insights can optimize your marketing and sales processes, initiating focused campaigns and messaging. By elevating conversions, you can deliver great customer experience, and increase customer retention and revenue growth.

Dynamics 365 Customer Insights is an ideal solution for companies that:

- Have customer data across multiple systems, including ERP, CRM, e-commerce, loyalty, point of sale and marketing automation
- Want to spend their marketing budget more efficiently
- Are trying to understand customer behavior patterns and find more ideal customers
- Are looking to personalize marketing messaging at scale



### Increasing the quality of customer touch points

Simply stated, businesses that make their customers feel known across all touch points will outsell competitors. Rich customer profiles can be built inside Dynamics 365 Customer Insights using customer data across modern and legacy systems, and can be used to deliver targeted customer journeys and personalized marketing messages.

### Getting started with Customer Insights

RSM US LLP's Dynamics 365 Customer Insights Quick Start process focuses on designing customer data segments and automated triggers, and building out Customer Insights using data imported from your source systems. We have developed custom templates for B2C and B2B companies and for specific industries, creating a road map for real-time data connectivity, and artificial intelligence and data enrichment. RSM's Quick Start process consists of three main steps:

- 1. Discovery and activation:** We benchmark your current customer touch points and create a list of tactical goals for personalized and timely messaging. Our team then activates Customer Insights and a data storage solution.
- 2. Design:** Our experienced advisors design your customer segments, message triggers and personalization. We also discover source systems data, and design data exports to systems of action.
- 3. Deployment:** Our team ingests, maps, matches and merges your customer data. In addition, we demonstrate data drill down segments and exports for messaging.

In a matter of weeks, we can demonstrate how Dynamics 365 Customer Insights can help you gain more actionable results and enable your team members to do their best work more efficiently. The solution provides direct benefits in several specific areas of your organization, such as:



**Sales:** Respond to changing business requirements with a flexible platform to rapidly create new solutions and ensure existing solutions are continuously optimized.



**Service:** Understand your customers better and respond more quickly by accessing internal and external data.



**Finance and operations:** Increase your return on investment with our agile and efficient Microsoft cloud solution.



**Commerce:** Streamline the customer experience from in-store to online, pre- and post-purchase.



**Marketing:** Gain end-to-end visibility by connecting data from external markets, social and legacy sources.

## The RSM difference

As a trusted advisor to more than 2,000 clients across the country, we pride ourselves on our ability to identify and accelerate the right technology solutions to create rapid time-to-value and drive immediate business performance for our clients.

In addition, our Microsoft certified professionals have met the highest standards in technological knowledge and experience. They combine their deep knowledge of Microsoft Dynamics 365 and Microsoft 365 applications with industry insight to create customized solutions for your specific needs. As a firm, RSM consistently ranks as a top Microsoft partner in the country and we have many gold competencies in the Microsoft Partner Network; we know how to deploy enterprise solutions that are adaptive and cost-effective, and help you reach your goals.

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